



U.S. General Services Administration

Federal Acquisition Service

Bill of Materials / Statement of Work (BOMSOW)

GSA Training Module Developed for NITCP

BOMSOW Training Module Overview

Description: This training module will take you step-by-step through the Bill of Materials/Statement of Work (BOMSOW) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

BOMSOW Glossary

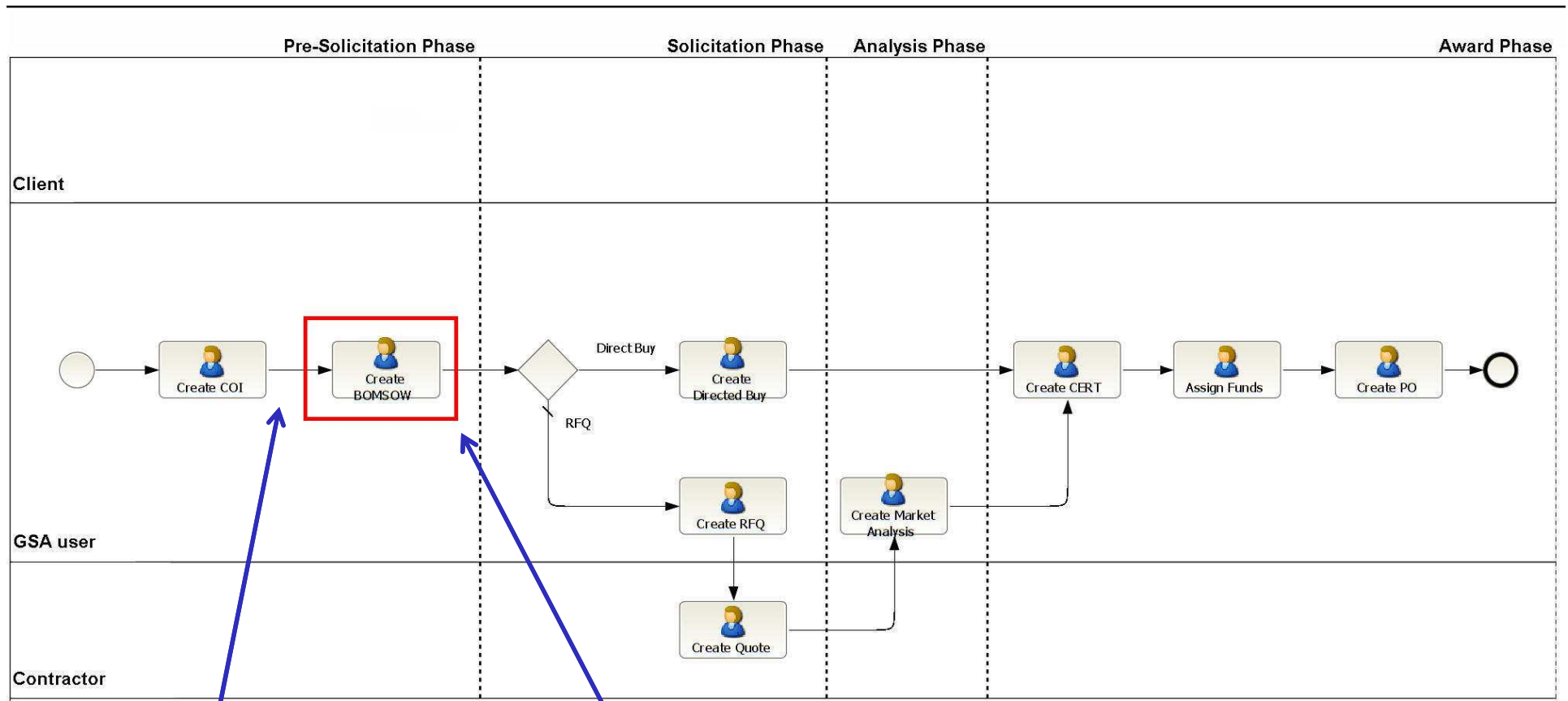
Term	Definition
BOMSOW	Bill of Materials/Statement of Work
Delivery Date	The Order level Delivery date is the maximum Delivery Date of all active COM task items.
Negotiated Award Date	The final date agreed upon for the order to be awarded.
NAICS Code	North American Industry Classification System; 4-6 digit code.
POP From	Date the Period of Performance begins; minimum start date of all active task items.
POP To	Date the Period of Performance ends; maximum end date of all active task items.
Order Summary	Used to list the order requirements or provide basic instructions for the vendors.
Requirements	File Attachments containing requirements for the order.
LAB	Labor (Fiscal Task Item Type)
COST	COST (Fiscal Task Item Type)
COM	Commodities (Fiscal Task Item Type)
FFP	Firm-Fixed Price (Fiscal Task Item Type)
Approving Official	Optional designation on BOMSOW to require a GSA official (besides the CSR) to approve the winning quote prior to client approval and/or certification of funds.
Publish in e-Buy	Option on the BOMSOW to publish the RFQ to e-Buy using e-Buy Connect.

BOMSOW Privileges

User Role Action	Create	Edit	View
GSA Users	✓	✓	✓
Client			✓
Contractor			✓*


*Contractors may only view pre-award if on Contractor List

Within the Pre-Award Workflow Context



The BOMSOW is automatically created when the COI is submitted

The BOMSOW is where GSA users select contractors for either the RFQ or Directed Buy and add task items to the order


IT-Solutions Shop
 You are signed in as Christopher CSR

IT-Solutions

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

[WELCOME](#) | **[ORDERS](#)** | [FUNDING](#) | [REGISTRATION](#) | [CONTRACTS](#)

Select a View:
 <<-- View Orders -->> <<-- View Inactive Orders -->> <<-- View Action Items -->> <<-- View Support Information -->>

Go to a Specific View Item: [Create New Order](#)

Orders - Entire Package



Next -> |


- Order Package
 - ID40120042-COI Sarah Client (Organization Name) Quote Selected>>IT Commodities
 - 00 Chronology
 - 01 Electronic Contract File (ECF)
 - 01 BOM/SOW ID40120042 - 000 Version 00 Amendment 00 ANALYSIS COMPLETE
 - RFQ Modification 000 Version 00 Amendment 00 GSA APPROVED
 - Quote Ver 00 Rev 00 for Steve Contractor (IT INDUSTRY PARTNERS) Cnt# << Open Market >>, BID=\$11,444.00
 - Quote Ver 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=\$30,000.00
 - Quote Ver 00 Rev 00 for Mary Contractor (CONTRACTOR COMPANY) Cnt# << Open Market >>, BID=\$15,000.00
 - *Market Analysis Version 00 - Recommendation Rejected
 - *Market Analysis Version 00 - Quote Selected: Steve Contractor - IT INDUSTRY PARTNERS (<< Open Market >>), \$12,817.28

Click on the 'BOM/SOW' link in the Order Package View to open an existing BOMSOW in view mode. Only one BOMSOW document exists per order.

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)


▼ GSA Order Support

 All Fields marked with  should be filled in by a GSA Representative.

1. Cust Svc Rep:  Christopher CSR

2. Cust Svc Rep: << Select Customer Service Rep >>


3. Cust Svc Rep: << Select Customer Service Rep >>

Fund Manager:  Francine FM

Contracting Officer: << Select Contracting Officer >>

Alt Contract Officer: << Select Contracting Officer >>

▶ Edit History



Save As Draft Submit and Proceed To BOMSOW Close Without Saving

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)

IT-Solutions Shop
 You are signed in as Christopher CSR

IT-Solutions

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

WELCOME
ORDERS
FUNDING
REGISTRATION
CONTRACTS

Bill of Materials / Statement of Work

Save as Draft
Submit for GSA Review
Close Without Saving

All Fields marked with are required.

Submitted By: Christopher CSR at 02/22/2012

Order ID: ID40120044, Mod 000, Version 00, Amendment 00

Client Rep: Sarah Client (Organization Name)

Status: **Draft**

Format dates as mm/dd/yyyy

Client Project Acceptance Date

BOM/SOW Finalized Date

Customer Funding Received Date

Negotiated Award Date

Review the Client Order

Project Descriptor: IT Commodities procurement

NAICS Code:

Severable Order?: Yes ☐ No ☐

Number of Option Periods (beyond the base period):

National Emergency?: ☐ Yes ☒ No

This is a Performance Work Statement or Statement of Objectives: Yes ☐ No ☐

View information about the order


View the BOMSOW status

Enter dates specific to the order

Enter the NAICS code

Is this order severable?
How many Option Periods (beyond the base period) does this order have?
Is this order for a National Emergency?
Is this a PWS/SOO?

All of these fields are for reporting purposes.


IT-Solutions Shop
 You are signed in as Christopher CSR

IT-Solutions

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

[WELCOME](#) | [ORDERS](#) | [FUNDING](#) | [REGISTRATION](#) | [CONTRACTS](#)

Bill of Materials / Statement of Work

[Govt. Est](#) | [Directed Buy](#) | [Request Quote](#) | [Edit](#) | [Go To Order Package](#)

Submitted By: Christopher CSR at 02/22/2012

Order ID: ID40120044, Mod 000, Version 00, Amendment 00

Client Rep: Sarah Client (Organization Name)

Status: **In-Process**

From: *Desired Period of Performance*
03/01/2012 to 02/28/2013

Date: *Desired Delivery Date*
03/01/2012

Client Project Acceptance Date
02/27/2012

BOM/SOW Finalized Date
02/27/2012

Customer Funding Received Date
02/27/2012

Negotiated Award Date
02/27/2012

Review the Client Order

Project Descriptor: IT Commodities procurement

NAICS Code: 1234

Severable Order?: Yes

Number of Option Periods (beyond the base period): 1

National Emergency?: No

This is a Performance Work Statement or Statement of Objectives: No

The order-level Period of Performance and/or Delivery Date is non-editable and derived upon submission of the BOMSOW.

The order-level POP Start date is the minimum POP Start date of all active LAB/COST/FFP task items.

The order-level POP End date is the maximum POP End date of all active LAB/COST/FFP task items.

The order-level Delivery Date is the maximum Delivery Date of all active COM task items.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.


Active ▾	Fiscal Task Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
No task items have been added.							

Order Summary:

🟡 **AND/OR** - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



Note the attachments made here will only be visible and accessible to an RFQ in ITSS or an RFI/RFQ in eBuy.

Enter an Order Summary in the text area and/or upload a file attachment with the order's requirements

File attachments have a maximum size limit of 50 MB per file.
File attachments must have a unique filename within the entire order.

Task items are added to the BOMSOW. The BOMSOW must have at least one active task item to submit. Planning of the task item structure on the order is **essential** since users cannot add or remove task items once an RFQ or Directed Buy is created.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.


Active ▾	Fiscal Task Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
No task items have been added.							

Order Summary:

AND/OR - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



Note the attachments made here will only be visible and accessible to an RFQ in ITSS or an RFI/RFQ in eBuy.

Click a button to add a task item of that type. A new task item row will be added to the task item table. Contractors will bid on both active and inactive task items.

Mark a task item Active if you want to fund and award it now. Mark a task item Inactive by unchecking the *Active* checkbox. Inactive task items are bid on by the contractor but activated during an Order Mod.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active	Fiscal Task Type	Item No.	Description	POP From Date	POP To Date	Delivery Date	Remove
<input checked="" type="checkbox"/>	FFP	1001	Installation / Maintenance - Base Year	03/01/2012	02/28/2013	n/a	
<input checked="" type="checkbox"/>	COM	1002	Mobile Solutions Equipment	n/a	n/a	03/01/2012	
<input type="checkbox"/>	FFP	2001	Maintenance - Option Year 1	03/01/2013	02/28/2014	n/a	
<input type="checkbox"/>	FFP	3001	Maintenance - Option Year 2	03/01/2014	02/28/2015	n/a	

Order Summary:

AND/OR - To complete the BOMSOW, you must enter in either an Order Summary or a list of documents document(s) (below). You may only be visible and accessible to an F

Each task item has a Fiscal Task Type of either COM, LAB, COST, FFP, or FEE.

Fee-only task items are not added on the BOMSOW. Fee-only task items are added on either the Market Analysis, Directed Buy, or Order Mod.

Each task item must have a unique Item No. to identify the task item within the order. The Item No. is an alphanumeric field with a maximum length of 10 characters.

The Item No. will be displayed on all subsequent documents throughout the order including Purchase Orders. Once the task item is awarded the Item No. cannot be changed.

Enter a description for each task item. The description does not have to be unique.

Depending on the status of the BOMSOW, users can remove an erroneously added task item by clicking the X

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active	Fiscal Task Type	Item No.	Description	POP From Date	POP To Date	Delivery Date	Remove
<input checked="" type="checkbox"/>	FFP	1001	Installation / Maintenance - Base Year	03/01/2012	02/28/2013	n/a	
<input checked="" type="checkbox"/>	COM	1002	Mobile Solutions Equipment	n/a	n/a	03/01/2012	
<input type="checkbox"/>	FFP	2001	Maintenance - Option Year 1	03/01/2013	02/28/2014	n/a	
<input type="checkbox"/>	FFP	3001	Maintenance - Option Year 2	03/01/2014	02/28/2015	n/a	

Order Summary:

Requirements: **File Attachments:**

Attach Files

Note the attachments made to an RFI/RFQ in eBuy.

LAB, COST and FFP task items must have a POP From date (aka POP Start) and a POP To date (aka POP End).

POP To dates must be after or on POP From dates.

COM task items must have a Delivery Date

If only COM task items are awarded on the basic order then LAB, COST, and FFP task items cannot be added to the order during an Order Mod. The order will be restricted to COM and FEE task items only.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active	Fiscal Task Type	Item No.	Description	POP From Date	POP To Date	Delivery Date	Remove
<input checked="" type="checkbox"/>	COM	1001	Mobile Solutions Equipment	n/a	n/a	03/02/2012	
<input checked="" type="checkbox"/>	COM	2001	Desktop Monitors	n/a	n/a	03/02/2012	

Upon submission of the BOMSOW, the data will be validated.

If the BOMSOW has only active COM task items and does not have an active LAB, COST, or FFP task item then a soft-validation pop-up warning is displayed.



Message from webpage

Basic order legs awarded with only active COM task items will only have the ability to have COM task items added/activated during order modification. Are you sure you want to submit this BOMSOW?

Click here to download a Standard Materials Template

To use Standard Materials Template, [Click Here](#).
 If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

Multiple Shipping Addresses: If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Special Instructions: Enter any other special notes you would like to make about the order requirements here.

Publish in e-Buy: ☐ Would you like to publish this opportunity as an RFQ in e-Buy?
☐ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Approval Info: ☐ Must the winning quote be approved before this order goes to client approval and funds are certified?
☐ Yes ☒ No

If Yes, select Approving Official's name from the list:
 -- Select Approving Official --

[Edit History](#)

[Submit](#) [Close Without Saving](#)

Enter multiple shipping addresses here. They will appear on the Purchase Order form 300.

GSA users can publish the RFQ in e-Buy or ITSS. Select the appropriate radio button and the BOMSOW will refresh with additional details.

GSA users can select to have a GSA Approving Official approve the winning Quote prior to Client approval (if selected) and certification of funds.

To use Standard Materials Template, [Click Here](#).
 If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

Multiple Shipping Addresses: If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Special Instructions: Enter any other special notes you would like to make about the order requirements here.

Publish in e-Buy: ☒ Would you like to publish this opportunity as an RFQ in e-Buy?
☒ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS

Sources Sought: ☒ Post as a Sources Sought or Request for Information (RFI) notice?
☐ Yes ☐ No

Contractor List: ☒ Contractor selection is not required in ITSS at this time>

Approval Info: ☒ Must the winning quote be approved before this order goes to client approval and funds are certified?
☐ Yes ☒ No

If Yes, select Approving Official's name from the list:
 -- Select Approving Official --

To issue an RFI, select Yes on the Sources Sought field

If the GSA user selects Yes to Publish in e-Buy then the Sources Sought field is displayed and contractor selection will be performed in e-Buy upon submission of the RFQ. The user will no longer have the option of creating a Directed Buy.

See the RFQ training module for details on e-Buy contractor selection.

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)

To use Standard Materials Template, [Click Here](#).
 If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

Multiple Shipping Addresses: If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Special Instructions: Enter any other special notes you would like to make about the order requirements here.

Publish in e-Buy: Would you like to publish this opportunity as an RFQ in e-Buy?
☐ Yes ☒ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Contractor List: <<----- List ----->>
 Steve Contractor (IT INDUSTRY PARTNERS)

Approval Info: Must the winning quote be approved before this order goes to client approval and funds are certified?
☐ Yes ☒ No

If Yes, select Approving Official's name from the list:
 -- Select Approving Official --

[Edit History](#)

Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)

If the GSA user selects *No* to Publish in e-Buy then the Contractor List will be displayed and contractors will be selected in ITSS. After the BOMSOW is submitted, the GSA user will have the option of creating an RFQ or Directed Buy.

As the GSA user selects contractors from the pick list they are added to the Contractor List field and *selected* in blue. GSA user should ensure their contractors are highlighted in blue before submitting the BOMSOW. Contractors in the Contractor List but not *selected* will not be issued the RFQ.

Click the *Pick From List* button to display the Contractor Selection list

Enter the first part of the value and click Go to jump directly to the first matching record

Close Window

Select Contractors From The List Below

Change the Sort Value: Contractors by Company ▼

Go To a Specific Value: Test Go

Next ->

- ▼ Contractors By Company
 - ▶ TEST COMPANY CORP INC
 - ▶ TEST COMPANY914MLP
 - ▶ TESTPROS INC

Click the drop-down arrow to search by another value

Contractors by Company ▼

Contractor Distribution Lists

Contractors by Company

Contractors by Name

Contractors by Contract Number

Click on a blue twistie to view all of the contractors registered under that company

Close Window

Select Contractors From The List Below

Change the Sort Value: Contractor Distribution Lists ▼

Go To a Specific Value: Go

<- Previous | Next ->

- [add / remove](#) 8A STARS - Functional Area 7A (Must select groups 7A and 7B)
- [add / remove](#) 8A STARS - Functional Area 7B (Must select groups 7A and 7B)
- [add / remove](#) 8A STARS - Functional Area 8A (Must select groups 8A and 8B)
- [add / remove](#) 8A STARS - Functional Area 8B (Must select groups 8A and 8B)
- [add / remove](#) AF NETCENTS
- [add / remove](#) ANSWER Contract Program Managers
- [add / remove](#) COMMITS NexGen GWAC
- [add / remove](#) Connections GWAC - Category 1
- [add / remove](#) Connections GWAC - Category 2
- [add / remove](#) Connections GWAC - Category 3
- [add / remove](#) DSL 1
- [add / remove](#) TIES MAINTENANCE AND MANAGEMENT
- [add / remove](#) LIANT GWAC
- [add / remove](#) iant Small Business GWAC
- [add / remove](#) Packard Design Jet 1050C Printer/Plotter
- [add / remove](#) (1)
- [add / remove](#) (2)
- [add / remove](#) (3)
- [add / remove](#) .BPA
- [add / remove](#) List 5B
- [add / remove](#) Millennia Contract
- [add / remove](#) Millennia Lite - Functional Area 1: Information Technology Planning, Studies and Assessment

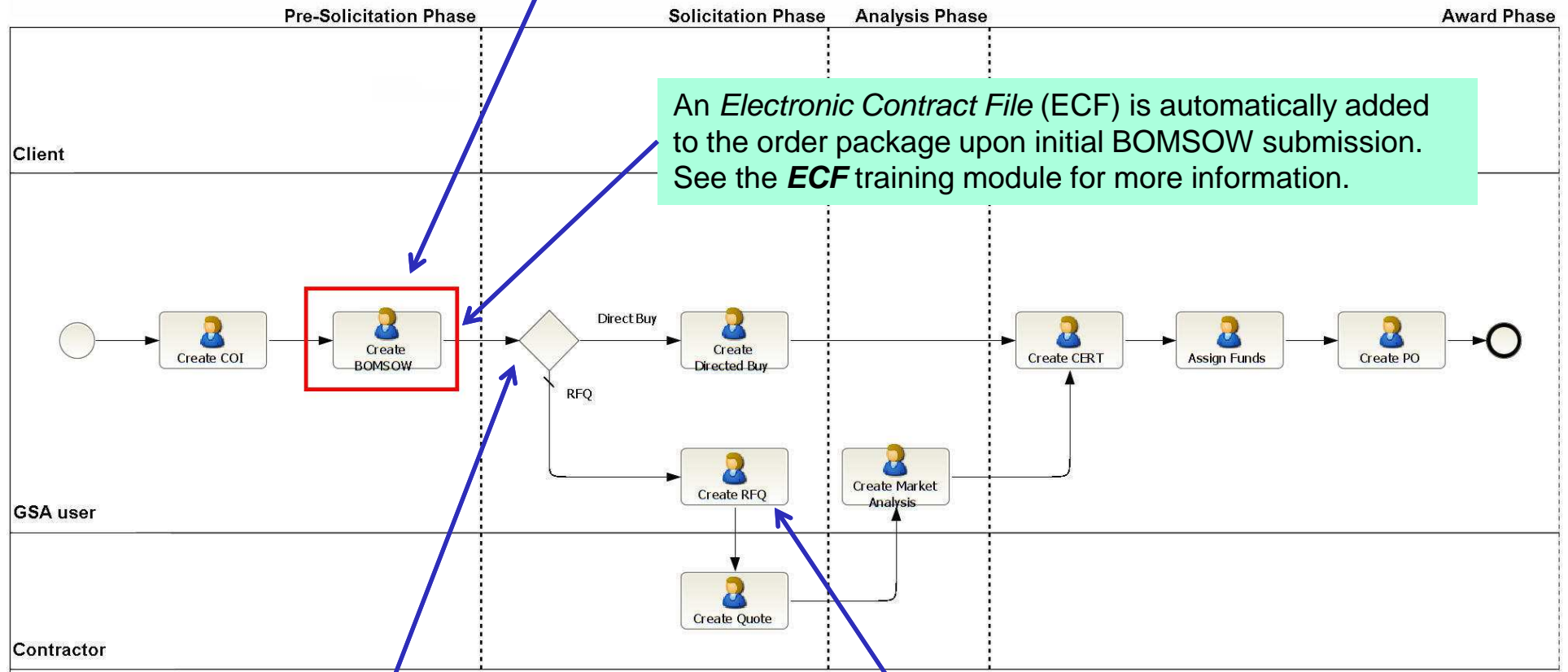
The search criteria option *Contractor Distribution Lists* allows GSA users to select all contractors associated with a specific distribution list (i.e. a *Contract Family*) rather than having to select each individual contractor

Example: Clicking *add* for the *ANSWER Contract Program Managers* list will populate the BOMSOW pick list with all contractors associated with this specific contract family

Next Steps...

If a GSA user wishes to select contractors at a later time they can save the BOMSOW as a draft

An *Electronic Contract File* (ECF) is automatically added to the order package upon initial BOMSOW submission. See the **ECF** training module for more information.



Once the BOMSOW is submitted for GSA Review, the GSA user can proceed with either issuing an RFQ or creating a Directed Buy

RFQs can be published in either ITSS or e-Buy

BOMSOW Status Glossary

Status	Definition
Draft	BOMSOW has been saved but not yet submitted for GSA Review.
In-Process	BOMSOW submission complete. CSR may create a Directed Buy or RFQ, based on e-Buy fields selected on BOMSOW.
Quotes Requested	RFQ has been submitted and RFQ close date is later than current date.
Quotes Process Closed	RFQ close date is earlier than current date. CSR can now create another RFQ or create a Directed Buy.
Market Analysis	A new Market Analysis has been generated.
Directed Buy	A new Directed Buy has been generated.
Analysis Complete	If Approving Official acceptance is required, the Market Analysis has been accepted by an Approving Official.
Accepted	Funds have been Certified in ITOMS.
Awarded	Purchase Order has been signed.



Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA BOMSOW training module please contact RBA Technical Support:

Phone: (877) 472-4877

Email: AASBS.helpdesk@gsa.gov

